

**MUNIS**

**MASS CREATE NEW PROJECTS AND  
ACCOUNTS  
(BGL-5)**

**MAY 2001**

***VERSION (2.0)***

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# MASS CREATE NEW PROJECTS AND ACCOUNTS

## OVERVIEW

New year projects and accounts can be mass created by copying them from existing projects. This process simplifies the budget entry required to establish budgets on new year projects.

The mass creation process allows a user to create Master Projects for the new year by copying project information from prior year projects. All projects chosen are copied, whether their status is active or inactive or their budgetary flag is set to yes or no. No changes are made to the copies, except that inactive prior year accounts are copied as active new year accounts. Changes may be made to the Project Code and Title during the “Define” step of the mass create process.

Accounts are copied to the new year projects. Also, the amount in the current year revised budget field will be copied into the next year requested budget field for the new accounts. Any accounts not needed for the new year project can be deleted through normal processing. Likewise, any new accounts required for the new year project can also be created through normal processing.

**NOTE:** *Once the mass create process is completed, DO NOT RUN the zero master utility. Running it will erase the entries in the requested budget fields of mass created accounts.*

*Only one user should run the mass creation process at a time to avoid conflicts.*

## REVIEWING CURRENT YEAR PROJECTS

Before mass creating new year projects and accounts, review a current Project Master List to identify which projects and accounts should be copied to new year projects.

**To Review Current Year Projects, Select:**

A) FINANCIALS

A) General Ledger Menu

G) Project Accounting Menu

B) Project Master Table

The following screen is displayed:

```

Session Edit Commands Settings Help
PROJECT MASTER MAINTENANCE
Action: Find Next Prev Browse Add Update Del Output Exit
Query the current database table.

Project code [???#*] Title [ ]
Major Project [ ]
Contact names [ ] State code [ ]
CFDA number [ ]
Status [ ]
Drawdown frequency [ ] Audit at close? (Y/N) [ ]
Start date [ ] Percent complete [ ]
Est completion date [ ] Actual completion date [ ]
Comment [ ]

FUNDING SOURCE AMOUNT
[ ] [ ]
[ ] [ ]
[ ] [ ]
[ ] [ ]
[ ] [ ]
[ ] [ ]
```

1. Select **Find** from the Ring Menu.
2. Enter the following in the **Project Code** field, replacing the “#” with the last digit of the current fiscal year:

???

For example, to find all Fiscal Year 2002 Projects, enter "??2\*" in the Project Code field. This will find all projects with "2" in the fourth character of the Project Code, including both 4- and 5-character Project Codes.

3. Press **Esc**.
4. At the prompt listing the number of records found, enter **Y** to continue.
5. Select **Output** from the Ring Menu.
6. Choose **2** for a **List sorted by code**.
7. Select **P** to **Print**.

Review the Project Master List to determine which projects and accounts should be copied to new year projects.

## MASS CREATING A NEW YEAR PROJECT AND ACCOUNTS

Repeat the mass create project process for each project to be copied to the new year.

To Mass Create a New Year Project and Accounts, Select:

A) FINANCIALS

A) General Ledger Menu

G) Project Accounting Menu

F) Mass Project/Account Creation

The following screen is displayed:

Session	Edit	Commands	Settings	Help
G/L MASS PROJECT/ACCOUNT CREATION				
Action: <b>Find</b> Browse Define Mass-create Exit				
Query the current database table.				
Model Project(s): [1401 ]				
=====				
Model Start Position: [ ]				
Model End Position: [ ]				
Target Substitute Value: [ ]				
Model Title String: [ ]				
Target Title String: [ ]				

1. Select **Find** from the Ring Menu.
2. Enter a 4- or 5-character **Model project code** to be found in the **Model Project(s)** field. For example:

Model Project(s):	Projects Found:
1401	Project 1401
1401A	Project 1401A

3. Press **Esc**.
4. Select **Browse** from the Ring Menu to display the Project Name.

The following screen is displayed:

```
Session  Edit  Commands  Settings  Help
_____
G/L MASS PROJECT/ACCOUNT CREATION _____
Action:  Find  Browse  Define  Mass-create  Exit
Display a list of selected data records. _____

Browse:  Next  Prev  Output  Exit
Display next browse page.
=====
Code    Title                                     Status
----    -
1401    PROFESSIONAL DEVELOPMENT                       ACTIVE _____
```

5. Verify that the project onscreen is the project to be copied.
6. You may print the project to be copied:
  - i. Select **Output**.
  - ii. Select **P** to **Print**.
7. Select **Exit** to return to the Ring Menu.
8. Select **Define** from the Ring Menu.

```

Session  Edit    Commands  Settings  Help
_____  G/L MASS PROJECT/ACCOUNT CREATION  _____
Define:  ESC to DEFINE, CTRL-P to CANCEL
Enter MODEL project start position for target substitution.

  Model Project(s):          [1401 ] _____
=====
  Model Start Position:      [4] _____
  Model End Position:       [4] _____
  Target Substitute Value:   [2  __] _____
_____
  Model Title String:       [* _____] _____
  Target Title String:      [* _____] _____
_____

      1 Projects found.

```

9. Enter **4** in the **Model Start Position** field.
10. Enter **4** in the **Model End Position** field.
11. Enter the **last digit of the new fiscal year** in the **Target Substitute Value** field. For example, enter a 2 for the new fiscal year of 2002. These steps will replace the fourth character of the Project Code with the last digit of the new fiscal year.
12. Enter \* (an asterisk) in the **Model Title String** field.

- NOTE:** *If a year is referenced in the Title, it will be copied without change using the asterisks. To change the year, enter the value to be changed in the Model Title String. Enter the new value in the Target Title String. For example, if 2001 in the Title needed to be changed to 2002, “2001” would be entered in the Model Title String and “2002” would be entered in the Target Title String. The sample screen below displays this example.*
- Use caution. If “2001” is entered as the Model Title String, a title like “01 PROJECT” will not be changed. But if just “8” is entered, then any “1” found in the Project Title will be changed. For example, the “1” in “14.64” would be changed to the value in the Target Title String.*

```

Session   Edit       Commands   Settings   Help
-----
G/L MASS PROJECT/ACCOUNT CREATION
Define:  ESC to DEFINE, CTRL-P to CANCEL
Enter MODEL project start position for target substitution.

Model Project(s):          [1401 ]
=====
Model Start Position:      [4]
Model End Position:        [4]
Target Substitute Value:   [2  ]
Model Title String:        [2001 ]
Target Title String:       [2002 ]

1 Projects found.

```

- Two reports listing the projects and accounts created are generated. It is recommended that the reports are spooled. If they are, note the name of the spool file before proceeding. Refer to *MUNIS System Administration (SA-3)* in the *MUNIS User Procedures Guide* for information on printing spool files.

Sample ***Projects Created*** Lists are attached as ***Appendix A***, with a short explanation of the fields. A sample ***Accounts Created*** List is attached as ***Appendix B***, with a short explanation of the fields.

## CORRECTING A PROJECT TITLE

Review the Project Title in the *Projects Created* List carefully. If it is incorrect and needs to be changed, perform the following procedure to correct it.

### To Correct a Project Title, Select:

#### A) FINANCIALS

A) General Ledger Menu

G) Project Accounting Menu

B) Project Master Table

The following screen is displayed:

Session	Edit	Commands	Settings	Help
PROJECT MASTER MAINTENANCE				
<b>Action:</b> <span style="background-color: black; color: white; padding: 2px;">Find</span> Next Prev Browse Add Update Del Output Exit				
Query the current database table.				
Project code	[ ]	Title	[ ]	
Major Project	[ ]			
Contact names	[ ]	State code	[ ]	
	[ ]	CFDA number	[ ]	
Status	[ ]			
Drawdown frequency	[ ]	Audit at close? (Y/N)	[ ]	
Start date	[ ]	Percent complete	[ ]	
Est completion date	[ ]	Actual completion date	[ ]	
Comment	[ ]			
FUNDING SOURCE		AMOUNT		
[ ]		[ ]		
[ ]		[ ]		
[ ]		[ ]		
[ ]		[ ]		
[ ]		[ ]		
[ ]		[ ]		

1. Select **Find** from the Ring Menu.
2. Enter the **Project Code** in the **Project code** field.
3. Press **Esc**.
4. Select **Update** from the Ring Menu.
5. Correct the **Title**.
6. Press **Esc** to update.



## Appendix A

### SAMPLE PROJECTS CREATED LISTS

The *Projects Created* list reports all the projects created in the mass creation process. For each, the original project code, new project code, and new project title are listed. A blank new project code column means that no new project was created, and the accompanying error message appears in the new project title column.

In all the samples, the fourth character of the Project Code was changed to “2”.

#### Search Criteria of “1401”:

2/19/XXX	YOUR DISTRICT	PAGE 1
15:24:14	PROJECTS CREATED	glmasspa

Orig Project Code	New Project Code	New Project Title / Error Message
1401	1402	PROFESSIONAL DEVELOPMENT

#### Search Criteria of “1401B”:

2/19/XXXX	YOUR DISTRICT	PAGE 1
15:54:28	PROJECTS CREATED	glmasspa

Orig Project Code	New Project Code	New Project Title / Error Message
1401B	1402B	PROFESSIONAL DEVELOPMENT/MES

#### Search Criteria of “1401E”:

2/19/XXXX	YOUR DISTRICT	PAGE 1
16:05:32	PROJECTS CREATED	glmasspa

Orig Project Code	New Project Code	New Project Title / Error Message
140XE		Error: Unable to create; new project exists.



## APPENDIX B

### SAMPLE ACCOUNTS CREATED LIST

This report lists all the new accounts created in the mass creation process. The report's columns include organization code, object code, new project code, account type, and description. A blank line separates projects.

This sample was generated with Find criteria of "1401". The fourth character of the Project Code was changed to "2".

02/19/XXXX                                      YOUR DISTRICT                                      PAGE 2  
 15:24:14                                      ACCOUNTS CREATED                                      glmasspa

Org	Object	New Project	Acct. Type	Description
-----				
0702104	0110	1402	E	CERTIFIED PERMANENT SALARY
0702104	0120	1402	E	CERTIFIED SUBSTITUTE SALARY
0702104	0130	1402	E	CLASSIFIED REGULAR SALARY
0702104	0213	1402	E	LIABILITY INSURANCE
0702104	0222	1402	E	EMPLOYER MEDICARE CONTRIBUTION
0702104	0253	1402	E	KSBA UNEMPLOYMENT INSURANCE
0702104	0260	1402	E	WORKMENS COMPENSATION
0702104	0331	1402	E	AUDITING SERVICES
0702104	0335	1402	E	OTHER PROFESSIONAL CONSULTANT
0702104	0339	1402	E	OTHER PROFESSIONAL SERVICES
0702104	0551	1402	E	PRINTING - FORMS
0702104	0580	1402	E	TRAVEL
0702104	0581	1402	E	TRAVEL - IN DISTRICT
0702104	0610	1402	E	GENERAL SUPPLIES
0702104	0630	1402	E	RESTRICTED STATE REVENUE
0702104	0731	1402	E	MACHINERY/EQUIP (NONINSTRUCT)
0702104	1990	1402	R	MISCELLANEOUS REVENUE
0702104	4500	1402	R	RESTRICTED FED THRU STATE